



SCORE 2013 User Guide

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# System requirements

- SCORE 2013 is designed as a standalone PC-based application.
- It consists of a .NET client application attached to a local SQL database.
- It requires Administrative rights to install (but not to run the application).

An overview of the system requirements are shown below:

Item	Minimum	Recommended
Operating system	Windows XP SP3	Windows 7 or above
Hard disk		1 GB free space
Memory	1 GB	2 GB
Graphics	32-bit graphics with 1024*768 resolution	32-bit graphics with 1280*800 resolution
Database	SQL Server Express 2008 R2 or above Note this is downloaded as part of the install if necessary.	
Other	.NET Framework 4 Client Profile Note this is downloaded as part of the install if necessary.  2013/14 Funding Information System (FIS) export database	Microsoft Excel (or equivalent) Adobe Acrobat Reader (or equivalent) Note that these are optional but will facilitate the viewing of exported data.  2012/13 Learner Information Suite (LIS) export database



SQL Server Express R2 and the .NET Framework 4 Client Profile must be installed as a minimum. If unavailable then the prerequisites wizard will download and install these components for you.

In most circumstances the default settings can be accepted but System Administrators should read the SQL Server Express R2 section of this document.

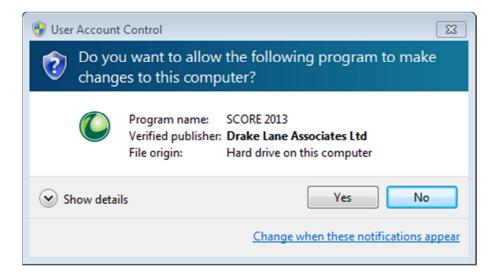
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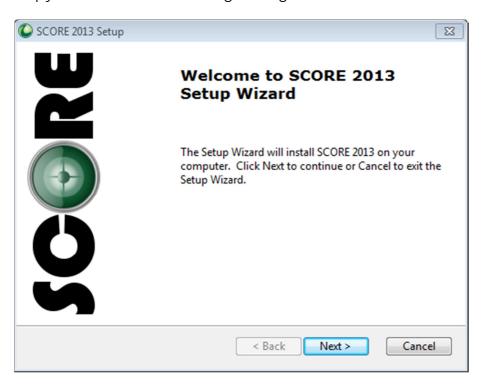
# Installation

The installation package is distributed for download from our website as a zip file. Download the zip file, extract all files to a folder on your PC and run setup to begin the installation.

If you are using Windows Vista or above you will probably see a User Account Control warning similar to that shown below.



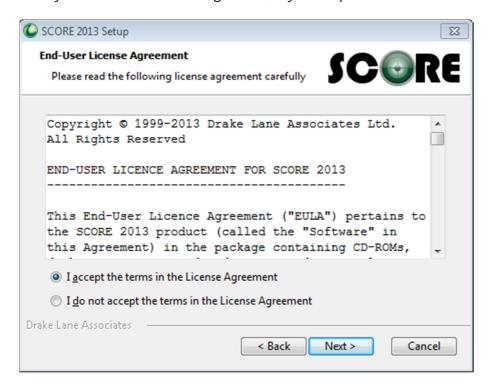
The files are digitally signed by us (the verified publisher) so you can click Yes. Once setup begins simply follow each of the wizard stages through as shown.



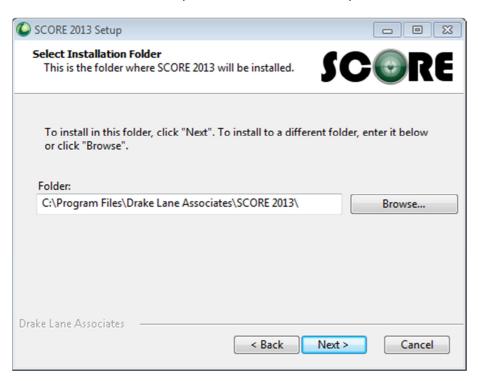
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Once you have read the licence agreement, if you accept the terms click Next to continue.



Select the installation folder (the default is recommended).



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Configure the SQL database connection by selecting the server and login.

- If you installed SQL express as part of the setup then by default the server will be in the format NAMEOFYOURCOMPUTER\DRAKELANE
- If you have FIS (Funding Information System) software installed then the server will normally be in the format NAMEOFYOURCOMPUTER\SQLEXPRESS



You may see network servers on the list but this product is designed as a standalone desktop application so we recommend using a local server.

Login credentials are set to Windows trusted by default but you may wish to use the SQL server login. To avoid any potential issues caused by insufficient user permissions we recommend using the sa (System Administrator) SQL server login rather than the Windows trusted. The connection login credentials are stored in an encrypted format. If you are using the default server (with the DRAKELANE instance) you may be able to use the username sa and password DrakeLan3. If you do not know the login credentials please ask your System Administrator.

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Once everything is ready click Install.



When the installation is complete click Finish, with the option to subscribe on our website for email news (recommended).



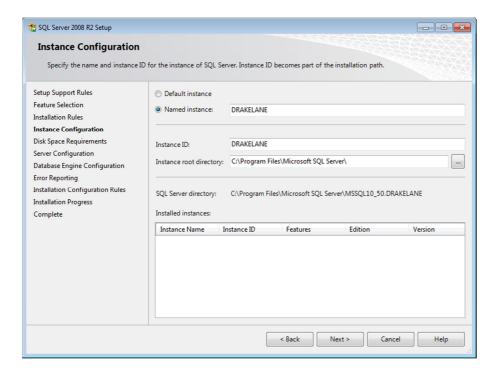
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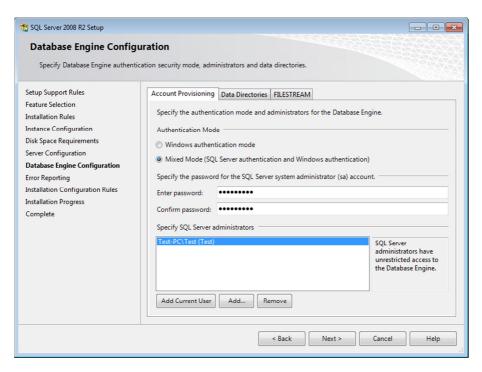
# Special notes for SQL Server 2008 R2 Express

If this prerequisite is required then in most circumstances the default settings can be accepted. System Administrators may wish to note the following settings specific to the SQL Server 2008 R2 Express installation

The default instance is named DRAKELANE.



The authentication mode is mixed by default. The system administrator account (sa) has the default password DrakeLan3.



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The database used for data analysis and reporting needs to reside on SQL Server 2008 R2 or above. The product is designed as a standalone desktop application so we recommend that one of the SQL Express editions is used on the client.

If you do not have SQL Server installed locally on your computer then the application installer can download this for you.

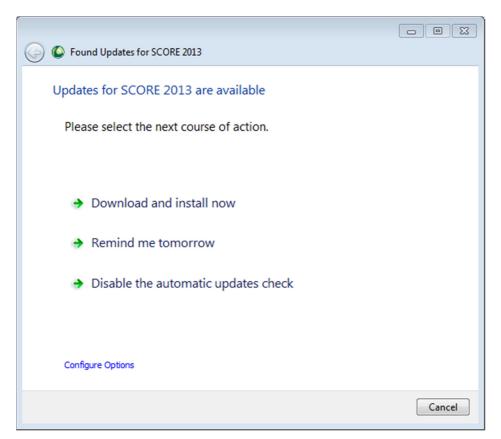
Although it is technically possible for the database to reside on a network SQL server instance the application is currently not designed to operate in a shared multi-user environment.

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# **Updates**

Software updates will be checked for automatically when an internet connection is available. By default updates are checked for every day but you can change this and other settings by selecting configure options on the screen below.





Alternatively, software updates can be checked for manually by selecting check for updates from the main menu ribbon.

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# Uninstallation

To uninstall the client application software, go via Windows Control Panel.

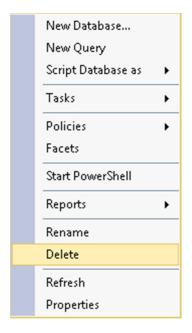


Use Programs and Features in Windows 7



Use Add/Remove Programs in Windows XP

To completely remove the SCORE database from the SQL server instance connect using SQL Server Management Studio and delete the database.





Please note that this guide is written with reference to SQL Server 2012 but similar processes apply to other versions.

Expand the Databases node, right-click the appropriate database and select Delete from the context menu.

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# Unlocking the software

You will not be able to use the software until an unlock code is entered. You unlock the software the first time it is run by contacting us with your UKPRN and computer fingerprint. We can then provide you with an unlock code.



Your licence is for your specific UKPRN and each computer where the software is installed will require a different unlock code. The unlock codes consist of 2 separate 8-character sections separated by a dash (hyphen) for example 0123ABCD-456789EF. They are of a shorter, simpler format than those issued in previous years.

When entering your unlock code the dash (hyphen) is entered automatically so there is no need to type it in. Any alpha characters entered are converted to UPPERCASE automatically.

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# Performing a build

You will need to perform a build to process your data before viewing reports and other information.



The build is managed by a wizard that will lead you through the necessary steps.

You don't have to follow the wizard through every step. To skip to a specific step, just click on the appropriate tab or select it from the main menu ribbon, though some steps must be completed in order (for example, you can't complete a build without first selecting a current year FIS export database file).

To move between the wizard steps do any of the following:

- Click on the appropriate tab
- Click the Back or Next buttons
- Type B (back) or N (next) on your keyboard

# Build wizard stages



#### Welcome

This is just a simple introductory page.

### Current year

Select the 2013/14 FIS export database for the current academic year. A list of more recent available database files is shown for convenience.



#### Previous year

Select the 2012/13 LIS 20 export database for your organisation. A list of more recent available database files is shown for convenience.



## Options

#### Set options.



Include only learner aims generating FE funding in appropriate reports?

Ensures only funded aims are included on reports where appropriate (for example some reports deal specifically with non-funded aims).



Remove exclusions from all reports?

You can exclude specific data from reports at aim or learner level. Selecting this option permanently removes all previously set exclusions data for all reports.

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#### Courses

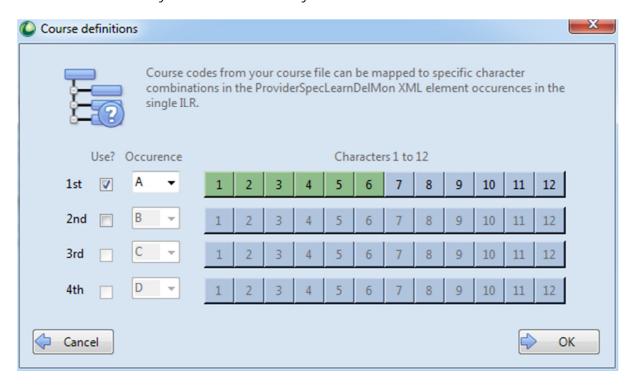
Set course definitions or import a course file. Once you have defined course code structures the build and process will automatically generate course codes.



#### Change course definitions

Allows you to define courses based on the any character combination of the ProviderSpecLearnDelMon ILR file XML elements.

Course definitions are set in the same way as in previous years. You select which XML elements and which characters contain the course code. In the example below, the first 6 characters of the first XML element are selected as identifying the course code. There is no restriction on how many of the available XML elements you can select to define your courses.



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Import course file

Import a course file in CSV (comma separated values) format. The format is the same as in previous years. A course file provides the link between the course codes and other provider specific information. A course file can be imported to obtain descriptive and hierarchical information, consisting for example of aggregate course and Department data which can be used to group and provide summary data in reports.

The course file is a comma separated (\*.csv) file consisting of 5 fields:

- Course code
- Aggregate code
- Aggregate title
- Department code
- Department title

Each course should be on a separate line, each field should be separated (delimited) by a comma and each field may optionally be enclosed (qualified) in quotation marks.



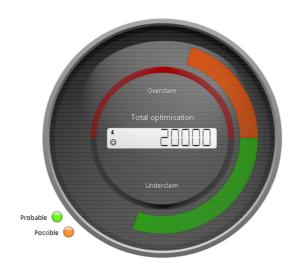
#### Build

Start the build and view progress. To start the build do any of the following:

- Click the gauge
- Press F8
- Click the Build button

Overall progress is shown on the green horizontal bar.

During the build, the current optimisation figures are represented on the optimisation gauge. The gauge is designed to convey several elements of optimisation at one time.



For example, this gauge indicates a probable £60k under claim and a possible £40k over claim, giving an overall £20k under claim.

The probable and possible indicators always cover exactly half the circumference of the gauge and their size shows the relative absolute values of each.

- £ The digital display shows the total calculated optimisation in £.
- © Positive indicates an overall under claim.

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- (3) Negative indicates an overall over claim.
- Zero indicates neither overall.

Probable optimisation is shown in green.

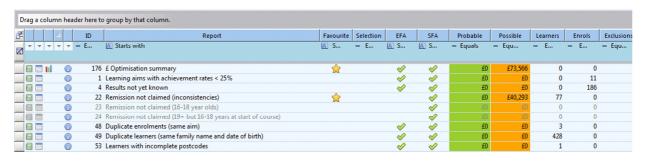
Possible optimisation is shown in orange.

Under claims (positive) are shown below the horizon ☺

Over claims (negative) are shown above the horizon 🕾



Investigate, view and output reports. For further information see the reports list section.



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# Working with the reports list

### Datasheet

The list of available reports is presented in a datasheet view, similar to that in previous years but with much more flexibility. This grid view is deliberately designed to look, feel and behave like a familiar Microsoft Excel style spreadsheet. If you already use our 4cast curriculum planning solution then this type of view will be very familiar to you.



You will find datasheets used in many places throughout the software. They may have a right-click context menu associated with them too which replicates many commands available elsewhere to provide you with different ways of performing the same task.

Changes can be made to the report list datasheet layout, including applied filters and sort order, and they will remain in place next time you start the application.

# Report navigation and selection

To move between and within records you can select the required cell with the mouse or use the keyboard cursor, page up and page down keys.



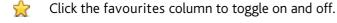
To open specific reports on screen do any of the following:

- Click the icon to open the printed report view.
- Click the icon to open the interactive chart view.
- Click the icon to open the spreadsheet-like datasheet view.
- Click the icon to open the form utility view.
- Double-click the row to open the default view for that report.

You can open more than 1 report at a time and switch between report windows in the usual way on the Windows taskbar.

#### Favourites and selections

You can mark specific reports as favourites or selections for easy access to frequently used reports.



Click the selections column to toggle on and off.

## Column layout and order



You can decide which columns are shown by clicking the field selector button at the top-left corner. To simply remove a field you can also drag the column heading away from the datasheet.

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To change the order of fields, simply drag-and-drop the column headings into the position you require.

To change the width of a column place the mouse between headings, then click and drag to the required width. Double-click between columns to automatically fit the widest entry.

# **Filtering**



Filtering allows you to see just the reports you are interested in. The top 2 rows of the grid coloured light blue are used for filtering.



To apply a filter select a filter rule from the drop-down list and enter criteria in the box below or select from a list of existing values (where applicable).



The clear filter button on the far left removes the filter for the entire scenario or filters can be removed for individual columns.



Alternatively just select the remove filters button from the grid section of the main menu ribbon.

## Sorting



To sort a column just click on the column heading. The direction of the arrow shows whether it is sorted ascending or descending. Hold down Shift to select multiple columns for sorting.

# Grouping

Grouping the reports provides an alternative view of the datasheet by arranging records into groups which have the same value in specified columns.

Drag a column header here to group by that column.

To group by a column, click and drag the column heading to the box at the top left.

You can group by multiple columns by continuing to add column headings as required. Each group can be sorted as required.

■ Individual groups can be expanded and contracted by clicking the + and - buttons.

X

To remove a grouping, click and drag the column heading away until the X is shown.

# Navigation pane

In addition to the datasheet, there is a Microsoft Outlook style navigation pane to the left of the reports list datasheet that allows quick access to specific groups of reports and other commands.

# Show

Items in this group allow you to show specific categories of report. Any filters you have already applied to the reports list datasheet are removed.



All

Shows all reports.



**Favourites** 

Shows reports you have marked as favourites.

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#### Selections

Shows reports you have marked as selected.



### Optimisation

Shows reports that have a funding impact calculated.



Chart available

Shows reports that have an associated interactive chart view.



Utility available

Shows reports that have a from-based utility.



Already open

Shows reports that are already open.



Have data

Shows reports that have data.

#### **Actions**

Items in this group allow you to perform actions on the reports currently shown in the reports list datasheet.



#### Batch PDF

Exports all of the reports to PDF.



## Batch Excel

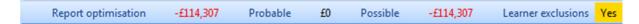
Exports all of the reports to Microsoft Excel in the file format currently selected on the ribbon menu.

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# Report views

A standard report has 2 default views when opened, the datasheet and printed report (shown by default) views. Each view is available on a separate tab. Both views also show summary information toolbar at the top of the screen with optimisation and exclusion information where applicable.



The additional chart and utility views are available where indicated for specific reports.

# Printed report

The report view shows the report as it will appear when printed. Standard navigation, print, export and other commands are on the ribbon.

If a filter is applied (via the datasheet) then this is shown on the first page. Depending on the report, it may not be possible to reflect the datasheet filter on the printed report. For example, you may filter for a specific course code but the report identifies its source data at learner level and a learner may be enrolled to several courses.

If there are exclusions then they are indicated in the page footer.

#### **Print**



Print

Select a printer, number of copies and other options before printing.



Quick print

Send the document directly to the default printer without making changes.

# Page setup



Scale

Stretch or shrink the printed output to a percentage of its actual size.



Margins

Select the margin sizes for the entire document.



Orientation

Switch the pages between portrait and landscape layouts.



Size

Choose the paper size of the document.

## Navigation



Find

Show the Find dialog to find text in the document.



First page

Navigate to the first page of the document.



Previous page

Navigate to the previous page of the document.

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Next page

Navigate to the next page of the document.

Last page

Navigate to the last page of the document.

#### Zoom

Show the mouse pointer.

Invoke the Hand tool to manually scroll through pages.

Invoke the Magnifier tool.

Many pages
Choose the page layout to arrange the document pages in preview.

Zoom out

Zoom out to see more of the page at a reduced size.

Zoom

Change the zoom level of the document preview.

Zoom in
Zoom in to get a close-up view of the document.

## Page background



Page colour

Choose a colour for the background of the document pages.



Watermark

Insert ghosted text or image behind the content of a page.

## **Export**



Export the current document in one of the available formats, and save it to the file on a disk.



Export the current document in one of the available formats, and attach it to the email.

#### Close



Click this button or press F3 to close the report.

# Data grid

The data grid view shows the report source data in a grid format with similar functionality to the reports list in that you can change column layout and order, apply filters, sort columns and group data. There are however some important differences:

Multiple layouts can be saved for each report.

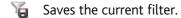
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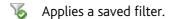
# Control de la description description de la d

- Multiple filters can be saved for each report.
- Columns can be frozen in position by clicking on the pin shown in the column header. Frozen columns remain in place when scrolling left and right.
- Exclusion related columns are always fixed at the left.

Some items on the ribbon menu are common to the report view but those relating specifically to the datasheet are shown below:

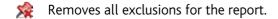
#### Filters





Clears all current filters.

#### **Exclusions**



Restores all exclusions for the report to those at the end of the last build.

#### Notes

- Toggles viewing the notes field.
- Removes all notes for the report.
- Restores all notes for the report to those at the end of the last build.

#### Layout

- Shows the column chooser so you can select which fields are shown on the datasheet.
- Automatically sizes all columns to fit the widest content.
- Saves the current layout.
- Applies a layout that has already been saved.
- Resets any changes made to the current layout since it was last saved.
- Sets the current layout to be your favourite layout for the report. Your favourite layout is used as the default.

#### **Export**

Export to PDF.

Export to Microsoft Excel with the file format currently selected on the ribbon menu as default.

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#### Report



Print the printed report view.

## Help



Click this button or press F1 to go to www.drakelane.co.uk and view the latest help documentation.

### Close



Click this button or press F3 to close the report.

# Chart



Where available, the chart view shows summarised report source data as an interactive chart. To drill-down to a specific subset of data just hover over the chart and click. You will then be taken to the data grid view filtered for the specific subset of data selected.

The chart formats are predefined but numerous settings may be adjusted via the ribbon menu:

# Grouping

The data grouping allows you to select how to categorise the chart data.

## **Format**

You can select from the available chart types and where to position the legend.



Show data labels.



Hide data labels.



Show in 3D.



Show in 2D.

# Gridlines

Set the visibility of both horizontal and vertical gridlines (major or minor) on the chart.

#### Zoom

Drag the slider controls to zoom in or out horizontally or vertically. Check the box to maintain the existing aspect ratio.

# **Export**

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# **Exclusions**

Exclusions allow you to exclude data from individual reports at learner or enrolment level. They are not applicable to all reports and where they are the exclusions work at learner or enrolment level, not both. In this way, you can prevent data being reported which you don't want shown. For example, it may be that action has already been taken or you are aware of the reasons for it showing on the report. On some reports we cannot say with certainty that data is wrong or requires correction just that further investigation may be required on your part.

Exclusions are stored permanently and are retained between different builds so they only have to be set once.

Exclusions are set at report level on the datasheet view. The exclude flag is fixed in place and is always the leftmost column on the datasheet.



Once excluded the records affected are coloured yellow. When excluding a learner all records for that learner on the report are excluded, as shown in the above example.



When an individual report has exclusions set it is indicated in the report information bar below the report ribbon menu. The number of exclusions is also shown on the page footer of the report.



For an overall view, when exclusions are set on any report it is also shown on the information bar below the main menu ribbon. The numbers of exclusions are also shown in a separate column on the reports list datasheet.

The setting (or removing) of exclusions is reflected in the learner and enrolment counts in addition to the optimisation calculations both overall and at individual report level immediately. There is no need to perform the build again.



Select remove exclusions from the report datasheet ribbon toolbar to remove all exclusions for the report or just use the excluded flag on individual datasheet rows.



Restores all exclusions for the report to those at the end of the last build.

#### Maintenance



For maintaining exclusions on all reports, select exclusions from the maintenance section of the main menu ribbon toolbar.

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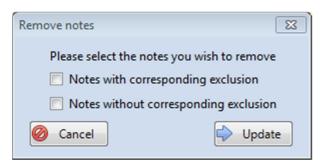


# **Notes**

Notes are optional and can be entered against records on individual reports at learner or enrolment level. Though separate from exclusions, they could for example, indicate the reason why specific records are excluded.

Notes operate in a similar way to exclusions; they are not applicable to all reports and may be entered at learner or enrolment level, not both.

- Once a note is added the pencil icon is shown against the record. Clicking the pencil icon also toggles viewing the notes field.
- Clicking the column next to the exclude flag or selecting show or hide notes from the datasheet ribbon menu toggles viewing the notes field. When excluding a learner the note is automatically repeated against all records for that learner on the report.
- Select remove notes from the report datasheet ribbon toolbar to remove all notes for the report. You can remove just notes that have an exclusion, notes without and exclusion or both.



Restores all notes for the report to those at the end of the last build.

#### Maintenance

For maintaining notes on all reports, select notes from the maintenance section of the main menu ribbon toolbar.

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# Main menu ribbon

The main application menu is in the style of a modern Microsoft Office ribbon toolbar.

### Grid



Clear filters

Removes any filters applied to the reports list grid.



**Export Excel** 

Exports the reports list grid to Microsoft Excel.

## Wizard



Welcome.

Current year (FIS export database selection).



Previous year (LIS database file selection).



Options.



Courses.



Build.



Reports.

For further information on each wizard stage please see the section on performing a build in this document.

#### Maintenance



Course data

Opens the form to manage and maintain course file data. The course data is presented in a datasheet view, similar to the reports list.



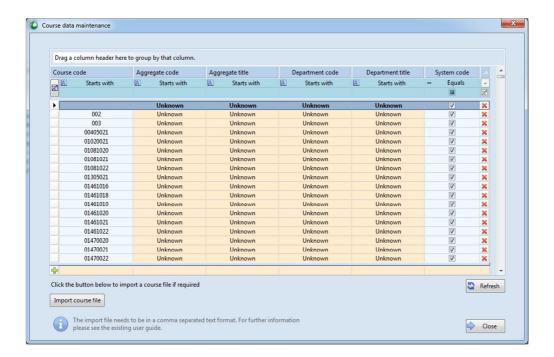
Individual record can be deleted by using the delete icon or highlighting the row and pressing Del on your keyboard.



Cells shown in light orange are editable.

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The course codes are generated from your course definitions. The other fields are taken from your imported course file.



This shows and allows removal of individual learner and enrolment level exclusions. Removing the exclusion here affects all reports for a particular learner or enrolment.

Notes

This shows and allows removal of individual learner and enrolment level notes. Removing the notes here affects all reports for a particular learner or enrolment.

# Open reports

This set of buttons performs actions on all currently open reports:

- Export PDF Export to PDF.
- Export Excel

  Export to Microsoft Excel in the file format selected in the drop-down box.
- Close all Closes all reports.

# Help



Online help

Click or press F1 to go to www.drakelane.co.uk and view the latest help documentation.

Email support

Click to send an email to support@drakelane.co.uk using your default email client. Don't forget there's also the feedback option.

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#### Feedback

Opens the online feedback form to allow you to:

- Send us general feedback on the software.
- Make a suggestion to change existing features or functionality.
- Request a new feature that would help you or other customers.
- Report a software bug.
- Send some other kind of feedback.

You can also add attachments to any feedback you send. You can still call (sometimes it's more appropriate) or email, but this way makes sure we can easily track the many responses we get.



#### Check for updates

Click to check manually for application updates. Application updates are also normally checked for automatically each day.



#### About

Shows software version and licensing information.

# Logs

We may request log files file to assist with any support cases you have open.



### Build

Opens the latest build log file.



## Application

Opens todays application log file.

## Exit



#### Exit

Click this button or press F3 to exit the application.

## **Drake Lane Associates**



Click to visit our website www.drakelane.co.uk.

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